



Mountain View Manor Assisted Living Business Plan

Response to an Informal Request for Proposal by Petersburg
Borough

Submitted on April 5, 2019 by Agnew::Beck Consulting to:
Shelyn Bell and Stephen Giesbrecht via email.



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April 5, 2019

Shelyn Bell, Director of Mountain View Manor
Stephen Giesbrecht, Borough Manager
Petersburg Borough



Dear Shelyn and Steve –

Thanks for reaching out to us with regards to Mountain View Manor Assisted Living. We understand that you are looking for a consultant to analyze the current operations, staffing and finances of your 20-bed assisted living home in Petersburg, Alaska. Currently, the home runs around a \$150,000 to \$200,000 annual operating deficit. We can take a look at revenue opportunities, efficiencies and staffing costs and provide you with some potential options for at least maintaining rather than growing that gap and potentially reducing the gap. Petersburg residents value Mountain View Manor and current public sentiment indicates a desire to continue to support the home with Borough resources. The home is currently full, with a sizeable waitlist. We will provide you with a business plan so that your team can continue to provide this valuable part of the continuum of care for seniors in Petersburg.

Our firm is well positioned to provide these services. Agnew::Beck Consulting is a multidisciplinary consulting firm based in Anchorage, Alaska. We are skilled in analysis, policy development, planning, public engagement, and project implementation. In addition to numerous senior needs assessments, we have conducted feasibility studies or written business plans for assisted living in Fairbanks, Unalaska, Homer, Unalakleet and Wasilla. We also recently completed a Staffing Plan and Cost Impact Analysis for all six Alaska Pioneer Homes, the central office and pharmacy. We are familiar with the constraints of operating assisted living in Alaska, including high cost of labor, limited labor supply, insufficient Medicaid waiver rates and challenges with access to gerontologists and pharmacies. We also understand that community support of assisted living homes like Mountain View Manor can make this housing option for seniors feel like home, while also supporting the operations of the facility. Lastly, we have experience and enjoy working with the community of Petersburg, including during our work on the Petersburg Comprehensive Plan Update in 2016.

We have included a proposed scope of services, budget and summary of similar projects. We are happy to adjust the scope of work to match your needs and interest. Agnew::Beck Consulting holds Alaska Business License number 1049371. Our Vendor Tax ID Number is 54-2076437. This proposal is open and valid for ninety (90) days.

Sincerely,

Shanna Zuspan, Principal::Owner

Agnew::Beck Consulting | 441 West Fifth Avenue, Suite 202 | Anchorage, AK 99501
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Scope of Work

Methodology

Task 1: Project Start-Up + Communications

The first step in this project will be to meet with the Petersburg Borough to establish project goals and obtain existing relevant materials. Topics to cover in the kick-off meeting include:

- Review goals for the project
- Understand existing internal data sources including resident characteristics, floor plans, organizational charts, position descriptions and staffing costs, operational costs and waitlists
- Identify need for additional market research to understand current and future utilization and demand
- Identify potential case study and comparable facilities for benchmarking staffing ratios and rate structure
- Identify key interviews within the Mountain View Manor
- Discuss method for gathering input from direct care staff, residents and community
- Discuss current and potential strategies to optimize staff
- Discuss data sharing protocol and confidentiality
- Review draft project timeline and identify potential site visit dates
- Identify project advisory team, if necessary. This could include just Shelyn and/or Steve, but also an interested Assembly/Council member or resident family member.

This task also includes monthly status updates and regular communication with Borough staff.

Task 2: Analyze Current Operations

Agnew::Beck will work with Mountain View Manor administration to download *de-identified* resident data by level of care, age, length of residence, care neighborhood home and payor source for the most recent four quarters. Agnew::Beck will review existing resident demographics, income, levels of care and payment patterns of Mountain View Manor to understand how the change in level of care provided could affect staffing. Resident confidentiality is important and will be maintained through practices such as deidentified resident data and encrypted project folders. We can also sign a Business Associate Agreement with the Petersburg Borough to share data.

Agnew::Beck will review current staffing and operations of the Mountain View Manor and create a staffing ratio matrix to compare with other homes of similar size in Alaska. Agnew::Beck will develop a status quo proforma to compare to potential alternative scenarios so that the Borough and stakeholders can understand how changes in staffing, non-staff expenses and revenues affect the operating gap.

During this task, Agnew::Beck will also summarize existing market conditions for assisted living in Petersburg. This will include using U.S. Census Bureau, American Community Survey, Alaska Department of Labor and Workforce Development and Alzheimer's Association data to characterize the current and projected senior population. This will help the Borough and community understand how the demand will increase over the next 30 years and how it compares to the state and other communities of similar size. The

analysis will include current and projected number of seniors by age cohort, Alzheimer's and related dementia prevalence and income.

Task 3: Staff and Stakeholder Outreach

We will use a combination of interviews, focus groups, surveys and/or site visits to engage staff, residents and community members in the Operational Analysis.

Agnew::Beck will conduct key informant interviews with Mountain View Manor staff to understand how current staffing is or is not meeting the care needs of residents, ideas they have for the home, capacity, scheduling, training, communications, use of technology and input in finding and maintaining quality staff. These interviews can occur by phone or in-person. If desired, Agnew::Beck could also develop and deploy an online survey.

If a site visit occurs as part of the scope of work, Agnew::Beck will host a residents' tea or social hour to understand what residents like about the Mountain View Manor, ideas they have for improvement and how they decided to live in the home.

Agnew::Beck can also use in-person or phone interviews or a survey to gain the input of residents' families and/or other stakeholders.

The site visit, survey and interviews will provide input into the potential future scenarios.

Task 4: Case Study Research

Agnew::Beck will conduct interviews and develop case studies of comparable facilities to use as benchmarks for staffing and rate structure. Comparable facilities include both private and non-profit assisted living homes in and outside of Alaska. Agnew::Beck will summarize the case studies in a matrix so that Mountain View Manor can be compared with other facilities.

Task 5: Model Potential Future Scenarios

Agnew::Beck will present the key findings from Tasks 2, 3 and 4 to the project advisory team and discuss up to four scenarios to model. These models will include variations in resident level of care, revenue sources, rate structure, non-staff expenses and/or staffing. Potential model scenarios include:

- **Status quo.** Current operations with no change
- **Optimized staffing.** Staffing levels adjusted to reflect recommendations from interviews, surveys and case studies.
- **Cost neutral.** Rate structure and revenue needed to complete cover the cost of care and the facility.
- **Capped level of care.** Do not provide highest level of care to reduce need for more intensive staffing.
- **Enhanced dementia care.** Staffing levels adjusted to include additional capacity for dementia care.

These models will include a proforma for ten years so that the Borough can understand how the operating gap changes in each scenario. Agnew::Beck will summarize the key findings from each model such as net operating revenue/deficit at ten years, net financial impact of the change from the status quo and staffing levels. The models will be live, so they can be adjusted as more information is learned through site visits and

interviews. Mountain View Manor, Borough leadership and Agnew::Beck will use the scenarios to select a model that will be recommended in the report.

Task 6: Business Plan Development

Agnew::Beck will draft all components of the analyses into a business plan. The business plan will include recommendations for moving forward with a proposed model and the detail about the models that weren't selected. The outline could be as follows:

1. Executive Summary
2. Introduction
3. Current Operations
4. Case Studies
5. Potential Future Scenarios
6. Recommended Scenario + Cost Impact
7. Appendices
 - a. Case study details
 - b. Staffing ratio matrix
 - c. Interview themes
 - d. Alternative scenarios not selected

Optional Task 7: Site Visit Outreach

This task is the in-person addition to Task 4. Agnew::Beck will visit Mountain View Manor to see the layout, meet with staff, families and community members. The director will help to identify and coordinate who will need to be available during the site visit. We can interview staff one on one or in small focus groups.

If Mountain View Manor chooses to convene an all staff meeting as part of or during the site visit, our firm can use Keypoint Interactive audience response system (live polling technology). We have found this to be a particularly effective way of gathering and sharing group feedback to facilitate in-depth discussion on a topic. The system integrates seamlessly with Microsoft PowerPoint and can be used as part of any presentation with an in-person audience. Participants vote anonymously, and results can be instantly projected on the screen in summary charts or tables or kept confidential for analysis later. With voting results in front of them, meeting participants can focus on deeper discussion or analyze any surprising results.

Optional Task 8: Present Key Findings in Person

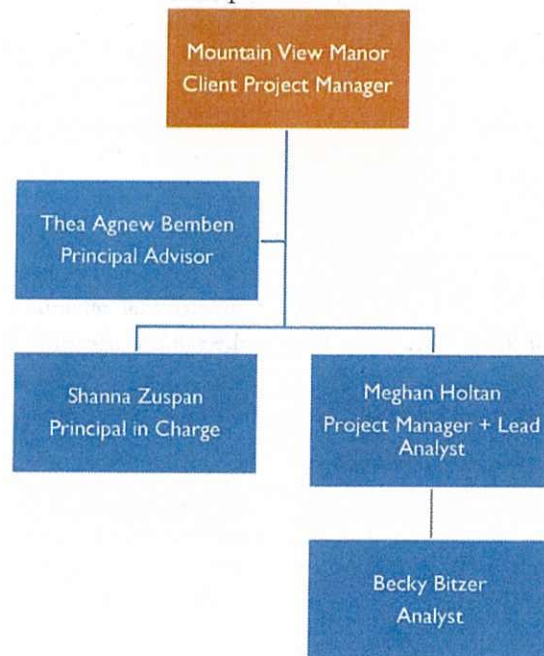
Agnew::Beck is available to travel to Petersburg to present the key findings and the report in person to stakeholders.

Management Plan

Project Team Roles

Meghan Holtan will serve as project manager to ensure on-schedule, on-budget project management. Meghan will have overall responsibility for the technical quality and timely completion of project tasks, coordination with the Mountain View Manor director and key staff, project planning and staff coordination, cost and schedule controls, progress reporting, and final report completion. Meghan will also serve as the lead analyst and develop the financial models of the potential future scenarios. Meghan has extensive experience with senior programs and long-term senior services planning. Most recently, Meghan managed the Staffing Analysis and Cost Impact Study for the Alaska Pioneer Homes, a senior needs assessment for the North Star Council on Aging and a business plan for an elder facility for Tanana Chiefs Conference. She also developed the interactive web map "[Aging in Place in Alaska](#)," which shared key demographic trends in Alaska's senior population across the state as well as where senior housing and assisted living are located.

Shanna Zuspan is a principal owner of Agnew::Beck Consulting. Shanna will be the principal-in-charge and will assist Meghan with developing the content and format of the report, analyzing data and guiding the financial modeling of the future scenarios, and will review draft and final versions of the report. She will also participate in project meetings and some staff interviews. Thea Agnew Bemben, managing principal, is also available for the project. Becky Bitzer will assist with research and analysis tasks. She can also provide support throughout the project and assist with the development of the final State Plan.



Budget

Mountain View Manor Business Plan	Managing Principal Thea Agnew Bemben		Principal Shanna Zuspan		Senior Associate Meghan Holtan		Associate Becky Bitzer		Total
	hours	rate	hours	rate	hours	rate	hours	rate	
July 2019 - October 2019		\$170		\$155		\$120		\$95	
Tasks									
TASK 1. Startup + Project Management	2	\$340	2	\$310	12	\$1,440	2	\$190	\$2,280
TASK 2. Analyze Current Operations	2	\$340	12	\$1,860	40	\$4,800	10	\$950	\$7,950
TASK 3. Staff and Stakeholder Outreach		\$0	10	\$1,550	24	\$2,880	10	\$950	\$5,380
TASK 4. Case Study Research		\$0	4	\$620	10	\$1,200	12	\$1,140	\$2,960
TASK 5. Model Potential Future Scenarios	2	\$340	12	\$1,860	44	\$5,280		\$0	\$7,480
TASK 6: Report Development	4	\$680	6	\$930	40	\$4,800	20	\$1,900	\$8,310
Supplies and Communications **									\$200
TOTAL Tasks***	10	\$ 1,700	46	\$ 7,130	170	\$ 20,400	54	\$ 5,130	\$34,560
Optional Tasks									
TASK 7: Site Visit		\$0	16	\$2,480	16	\$1,920		\$0	\$4,400
TASK 8: Present Key Findings In-Person		\$0	12	\$1,860	6	\$720		\$0	\$2,580
Travel *									\$3,291
TOTAL Optional Tasks	0	\$0	28	\$4,340	22	\$2,640	0	\$0	\$10,271

Exclusions + Terms

* Travel - Roundtrip from Anchorage. Includes transportation, lodging and per diem for two trips to Petersburg. Based on best available flights, Task 7 includes two nights, one full day for two people. Task 8 includes one night for one person.

** Other Expenses - Include costs for phone and related equipment and services required in the normal performance of the contract. Digital versions of all final materials will be submitted in an organized manner to the client for future editing, use and reproduction. Rights to final versions of all materials are transferred to the client upon conclusion of the project. A::B reserves the right to use any and all project materials for educational and marketing purposes. A::B reserves the rights to any draft or conceptual materials developed in the course of the project, or other materials specified in the terms of the contract.

*** A::B reserves the right to move budget between tasks, staff and subcontractors so long as costs do not exceed the total budget.

Experience and Qualifications

Firm Overview



AGNEW
:: BECK

Agnew::Beck Consulting is an award-winning, multidisciplinary consulting firm based in Anchorage, Alaska and Boise, Idaho. We are skilled in analysis, policy development, planning, public engagement, and project implementation. Since 2002, we have helped clients strategically respond to challenges and opportunities to achieve their goals. Our team is committed to effective and efficient project management. We work to build healthy communities locally, regionally and statewide.

Our firm's areas of specialty include:

- Public, Behavioral and Community Health
- Data Analysis + Market Research
- Facility + Business Planning
- Grant Writing + Project Financing
- Health Systems Assessment + Planning
- Housing and Affordable Housing
- Organizational Development
- Public Policy Analysis + Development

By combining creativity and vision with practical implementation, Agnew::Beck helps clients accomplish short-term objectives and set out a clear path for long-term success. We are committed, passionate, and practical partners, working together to identify and tackle a project's most important issues with smart, effective solutions, and with community stakeholders at the center of the process. "Engage, Plan, Implement" is our approach to helping people, places and organizations get beyond ideas and make things happen.

Contractor Location

Agnew::Beck occupies a fully functioning office, served by all necessary office equipment to complete tasks in a timely and professional manner. Agnew::Beck possesses the following computer software that could be needed for report production: all Microsoft Office programs (Word, Excel, Power Point, Outlook), Adobe Acrobat, and InDesign. Agnew::Beck has good working relationships with a number of local printing companies, as well as a solid understanding of how to submit documents for print should the need arise. Agnew::Beck has reliable Internet access and in-house expertise in website design and web-based communication, as well as excellent working relationships with other professional web designers and technicians. We are able to set up meetings via video and teleconference so that stakeholders can participate remotely. Most work will be performed in Anchorage. Agnew::Beck's office is located at 441 West Fifth Avenue, Suite 202, Anchorage, Alaska 99501. Some analysis will occur in our Boise office. Staff members are available to attend project meetings at the client's office and in other locations as needed.

File and Network Security

Agnew::Beck can provide a secure, password-protected storage location for all project information related to the project. We are also able to ensure that transfer of project information occurs only through a department-approved transfer method. All of Agnew::Beck's server files, including files with project information related to this project, are backed up to an external drive in a secure location daily.

Key Personnel

Thea Agnew Bemben, Principal Advisor



Thea Agnew Bemben is the managing principal and co-founder of Agnew::Beck Consulting, a planning, policy and community development firm based in Anchorage, Alaska. Thea has 23 years' experience working with statewide and community organizations to bring about real improvements in the health and social conditions of the people they serve. Thea couples her expertise in health and human services planning with strong experience working with Alaska Native communities and tribal organizations. Thea is an experienced facilitator of decision-making dialogue on a wide range of public policy issues.

In recent years, Thea led the effort to develop recommendations to redesign Alaska's Medicaid program; she has worked with many tribal health corporations and statewide and community organizations to expand services for Elders, people with behavioral health issues and disabilities, and to strengthen vulnerable families; she is currently helping a coalition in Anchorage to end homelessness.

Shanna Zuspan, AICP, Principal in Charge



Shanna's land use planning expertise is coupled with comprehensive experience managing public finance and redevelopment programs for local government. Shanna returned to her hometown and joined Agnew::Beck after nine years in public finance, redevelopment, and land use in the Sacramento region. As senior associate for a private economic and planning firm, she served as primary technical analyst and project manager on housing market analyses, economic forecasting, redevelopment strategies, financing plans and real estate feasibility studies. Shanna earned a master's degree in city planning (emphasis in housing and economic development) from the

Massachusetts Institute of Technology. Since joining Agnew::Beck in 2010, she has lead long-term care studies and assisted living plans across the state including a demand forecast for assisted living in Juneau, and a strategic plan for the State of Alaska to address the needs of people with Alzheimer's disease, a feasibility assessment for the Wasilla Area Seniors, Inc. Continuing Care Community Feasibility Study, Maniilaq's Elder Services Business Plan, an assisted living plan for Aleutian Pribilof Island's Association and a business plan and feasibility study for an Elder Care Facility for Tanana Chiefs Conference in Fairbanks. Shanna was the principal in charge of the Alaska Pioneer Homes Staffing Analysis and Cost Impact Study. Her strength is in her ability to help clients determine the best mix of long-term services and supports given the financial realities of organizations and the communities they serve.

Meghan Holtan, Project Manager



Meghan Holtan is the creative and analytical force behind many of Agnew::Beck's planning projects. Her success is based in her ability to pick the right tool to analyze and communicate data. Meghan earned a master's degree in environmental science with a concentration in environmental and community planning. Her experience includes GIS analysis, cartography and web mapping. Since joining Agnew::Beck in 2010, she has projected senior population growth and conducted case study and best practices research for several long-term care projects in Alaska. Statewide policy projects include Recommendations for a Long-Term Care Strategic Plan and Alaska's Roadmap to Address Alzheimer's Disease and Related Dementia. She has worked on business models to support elder services like assisted living, senior housing, skilled nursing and hospice for Maniilaq Association, Juneau Economic Development Council, South Peninsula Hospital, Catholic Community Service Hospice and Home Care of Juneau, Wasilla Area Seniors Inc., Eastern Aleutian Tribes and Tanana Chiefs Conference. She is managing the Alaska Pioneer Homes Staffing Analysis and Cost Impact Study and is currently managing the North Star Council on Aging Senior Needs Assessment. She believes the principles that enable Alaskan seniors to age-in-place make vibrant communities for people of all ages.

Becky Bitzer, MSW, Lead Analyst



Becky is an Associate with Agnew::Beck, joining the team in 2017. She holds a Master of Social Work from Washington University in St. Louis and a Bachelor of Social Work from the University of Missouri – Columbia. Becky strives to bring the social work values of service, social justice, dignity and worth of the individual, the importance of human relationships, integrity, and competence to both her personal and professional life. These values guide and bring success to her work connecting with stakeholders statewide. Becky is an avid traveler and started her career in Alaska by bringing behavioral health training and resources to providers across the state. This travel experience helps inform her understanding of the unique opportunities and challenges facing individuals and communities in the 49th state. Becky recently conducted the analysis and presentation of demographic data and trends as well as internal data for the Alaska Pioneer Homes Staffing Analysis and Cost Impact Study.

Relevant Project Experience

Alaska Pioneer Homes Staffing Plan and Cost Impact Analysis

Alaska Mental Health Trust Authority | 2018 to 2019 | The Alaska Mental Health Trust Authority contracted with Agnew::Beck to develop a staffing plan and cost impact analysis that will help the Pioneer Homes continue to meet its mission and short-term goals of providing assisted living care to Alaskan elders. To do this, Agnew::Beck reviewed current staffing and operations of all six Pioneer Homes and reviewed existing demographic, income, levels of care and payment patterns of the Pioneer Homes to understand how the change in level of care provided could affect staffing. Agnew::Beck interviewed and developed case studies of comparable facilities to use as benchmarks in the staffing analysis. An online survey, key informant interviews and site visits are all strategies used to understand how current staffing is or is not meeting the care needs of residents. Using background research, benchmarking and site visits, Agnew::Beck developed three staffing scenarios and financial models for each scenario developed. Financial models included variables such as vacancy rates, different staffing levels and certification level of staff. A report, including recommendations for moving forward with a proposed staffing model for each home, as well as recommendations for the system as a whole, was the end product of this project.

Agnew::Beck project staff traveled to each Pioneer Home to meet with Home leadership, direct and ancillary care staff and the elders themselves. Focus groups and individual conversations with staff and elders helped the consultant team give a personal voice to the data and understand the numbers in the context of staff and elder experiences.

Elder Facility Feasibility Study + Business Plan

Tanana Chiefs Conference | 2017 to 2018 | Tanana Chiefs Conference hired Agnew::Beck to conduct a feasibility analysis to convert an existing 10-unit patient hostel in Fairbanks into the Bertha and Johnson Moses Elder Care Facility. Agnew::Beck conducted a financial analysis and developed a proforma for three scenarios: independent housing, high level assisted living and a tiered assisted living home similar to the Pioneer Homes' structure. The analysis included estimating the future Native elder population and utilization of housing based on current Fairbanks area and national utilization rates. Agnew::Beck conducted interviews with the Pioneer Home and other assisted living providers in the region to estimate and benchmark staffing needs and costs associated with varying levels of care. Agnew::Beck modeled operating revenues based on expected payor mixes developed using comparable facilities and an estimation of Medicaid waiver clients. The client selected the independent housing scenario and is moving forward with the transition of the facility. Agnew::Beck drafted the business plan to support the transition of the current patient hostel into a facility where Native elders can enjoy traditional foods and speak their language on a regular basis in Fairbanks.

Reference: Shirley Lee | Tanana Chiefs Conference | shirley.lee@tananachiefs.org | 907.452.8251, ext. 5502

Unalaska Assisted Living Feasibility Study

Aleutian Pribilof Islands Association | 2017 to 2018 | Agnew::Beck tested the feasibility of developing and providing assisted living, adult day and/or care coordination to elders in Unalaska and the greater Aleutians. Interviews, a market study and pro forma analysis will contribute to APIA's decision about

whether to proceed with expanding their elder services into these needed areas. Client outcome: Reliable financial information to support whether to build new assisted living and adult day.

Reference: Charles Fagerstrom | Aleutian Pribilof Islands Association, Inc | charlesf@api.ai | 907-222-4207

Strategic Business Plan for Elder Services and Housing in the Maniilaq Region

Maniilaq Association | 2016 | Agnew::Beck prepared a comprehensive business plan to address the full range of elder services across the continuum of care for the Maniilaq region. Currently, Maniilaq Association provides skilled nursing and limited home and community based services to elders. Agnew::Beck evaluated population trends for aging residents and estimated demand for services across the long-term services and supports continuum. A financial feasibility assessment of new services was prepared to help identify what new services should be provided in the region. Supportive housing, additional chore and respite, and small-scale assisted living were some of the top recommendations. The model included an analysis of staffing given a combination of services or standalone projects. Agnew::Beck worked with the client to use current staffing, operational and indirect costs. The report also included recommendations to improve administrative efficiencies such as consolidating elder services under one department. Client outcome: an improved understanding of what elder service programs are financially viable combined with a better understanding of elder service needs.

Reference: Bree Swanson | Maniilaq Association | Bree.Swanson@maniilaq.org | 907.442.7031

South Peninsula Hospital Long Term Care Strategic Plan

South Peninsula Hospital | 2015 | The South Peninsula Hospital (SPH) operates a 28 bed skilled nursing facility in Homer, Alaska. As the senior population in Homer, the Kenai Peninsula Borough and the rest of Alaska increases due to the aging of the baby boomers, additional demand for senior services is expected. SPH wants to plan for the future and they engaged Agnew::Beck Consulting to prepare a strategic plan. The planning process included interviews with public and private senior service and housing providers to help identify whether, and how, to increase the range of senior long-term care programs SPH offers.

Reference: Laura Hansen, Director of Strategic Initiatives & Planning | South Peninsula Hospital | lhansen@sphosp.org | 907.235.0237

Wasilla Area Seniors Inc. Continuing Care Feasibility Study

Wasilla Area Seniors Inc. | 2014 | The Wasilla Area Seniors Inc. (WASI) provides senior housing, meals, and senior center services in the Wasilla area. WASI is evaluating whether to expand their service programs both on campus and throughout the Matanuska Susitna Borough. Agnew::Beck prepared a study that assesses the overall need for a range of senior services and examines the regulatory, organizational, and financial feasibility of expanded programs for WASI. Services under evaluation include assisted living, personal care attendants, hospice, care management, and skilled nursing.

Unalakleet Assisted Living Feasibility Study

Native Village of Unalakleet | 2014 to 2015 | The Native Village of Unalakleet has proposed to build an assisted living facility for elders in the region. Currently there is no assisted living in the Norton Sound

Region; Unalakleet seeks to fill this gap. The feasibility study examined a number of different models of assisted living care, including different sizes of facility, and a combined model with both assisted and independent living units. For each model, the study analyzed a range of scenarios that examined the cash flow resulting from a payer mix that would provide the minimal amount of fee-based income to the maximum fee-based income that the proposed facility might realistically see.

The results confirm a systemic gap in Alaska's long-term care system: assisted living in Alaska is costly to operate, and only a limited number of Alaskans have high enough incomes to be willing and able to pay the private pay cost for assisted living for any length of time. For the remaining seniors and disabled, the income and level of care need requirements for public assistance programs that can support their stay in assisted living homes places many Alaskans out of the ability to access assisted living services. As a result, although there is a significant need for assisted living homes, the facilities often require a subsidy to operate, making them unfeasible for many would-be operators. The proposed Unalakleet facility is likely to be no different. However, through the scenario analysis, the study estimates the amount of funds that would be needed to fill the operating gap. The Native Village of Unalakleet is now working with regional partners to fill that gap through donations, contributions, and other arrangements, such as possibly designing the facility with rental housing to subsidize the assisted living home's operations. Update: There is a current bid out for construction of a 10,043-square foot elder assisted living facility.

Reference: Tracy Cooper | Native Village of Unalakleet | elder.services@unkira.org | 907-624-3622 ext. 4

Assisted Living Facilities Survey + Report

Division of Health Care Services, Section of Certification and Licensing | 2012 | Agnew::Beck developed and fielded a survey of people connected with Assisted Living Homes in Alaska. Respondents included Assisted Living Home staff and administrators, residents and family members, associated nonprofit and community groups, and Section and other State agency employees. Agnew::Beck prepared a report that summarized the results and offered Section staff crucial information about the current state of Assisted Living Home facilities across the state. The survey reported on the effectiveness of Section requirements, with particular focus on topics such as facility operations, staff quality, staff education and training, and challenges in meeting regulatory requirements.

Survey Of Behavioral Health Clients In General Relief Assisted Living

State of Alaska Department of Health and Social Services, Division of Behavioral Health (DBH) | 2013 | Agnew::Beck assisted the State of Alaska Department of Health and Social Services (DHSS), Division of Behavioral Health (DBH) with ensuring that clients with serious mental illness, residing in general relief assisted living homes, were receiving appropriate behavioral health services and assessed whether or not these clients could move to more independent living settings. Telephonic and electronic surveys were conducted with over 150 clients or their guardians (if one was identified). A narrative summary and analysis of the data were submitted, along with a database containing the information obtained from the surveys.

Pioneer Homes Leadership Team Strategic Plan

State of Alaska | 2017 | Thea Agnew Bembem from Agnew::Beck Consulting facilitated a strategic planning session with the Pioneer Homes Leadership Team to develop a strategic plan in five high priority areas: high quality of care, financial sustainability, pharmacy and medication management, staff training and development, and community outreach and engagement. Each priority area identifies leads and team members to help move the priorities forward over the next three years. The group also identified long-term goals and 3-year targets towards progress.

Reference: Amanda Lofgren | Alaska Pioneer Homes | amanda.lofgren@alaska.gov | 907.343.7206

Fairbanks North Star Borough Senior Needs Assessment

North Star Council on Aging | 2018 – present | Agnew::Beck is characterizing the demographic trends related to seniors in the Fairbanks North Star Borough including age, income, Alzheimer's disease and related dementia's prevalence, geography, and caregiver ratios. Agnew::Beck also characterized the services available in the borough related to long-term services and supports. Agnew::Beck compared the number of units of senior independent living, senior assisted living and skilled nursing across several comparable boroughs in order to estimate the future demand for various housing settings for seniors at five, 10 and 20 years in the future. Agnew::Beck used the Fairbanks results of the Alaska Commission of Aging's Older Alaskans survey and provider survey as input to the needs assessment. Agnew::Beck is compiling key findings to share with stakeholders at a meeting in Fairbanks and will summarize the results in a final report.

Juneau Hospice Business Plan

Catholic Community Service | 2016 | Catholic Community Service's (CCS) Hospice and Home Care of Juneau is one of five in-home Medicare hospice providers in Alaska. Patient demand can be unpredictable and smaller hospice programs are vulnerable to these changes. Catholic Community Service hired Agnew::Beck to develop a business plan for CCS to continue to provide this valuable community service while remaining financially sustainable. Agnew::Beck analyzed recent and projected population trends, interviewed hospice providers across Alaska, and reviewed Medicare hospice utilization rates across the United States and Alaska. Agnew::Beck worked with CCS to obtain program data such as trends in utilization, staffing, costs and revenue. Agnew::Beck conducted key informant interviews to better understand current use of hospice services, and opportunities for continued or increased use of hospice services. Agnew::Beck then developed a business model for financial sustainability by 2021 by increasing utilization and length of stay to Alaska averages. Yearly benchmarks included in the business plan help CCS measure whether they are on track to reach financial sustainability by 2021. Update: CCS productivity is already near the four to five visits a day target with new a travel nurse staff on board.

Reference: Jennifer Carson | Catholic Community Service | Jennifer.Carson@ccsjuneau.org | 907-463-6162

King Cove Senior Housing Center Business Plan

Eastern Aleutian Tribes | 2015 | Communities across Alaska, including King Cove, are facing the question of how to support elders to remain in their community as their need for care and support change. Agnew::Beck helped a core team including Eastern Aleutian Tribes (EAT), Aleutian Housing Authority (AHA), the City of King Cove and Aleutian Pribilof Island Association to write a business plan for a four-unit senior housing project with a caregiver unit. Once constructed, residents will have access to a renovated

community center including a recreation area, exercise room and sauna, laundry and kitchen. The caregiver unit will allow a person to live rent free in exchange for general oversight of the residents and facility. Supportive services for individuals will be available through Aleutian Pribilof Islands Association's Personal Care Assistance program on an as needed basis. Agnew::Beck developed a financial feasibility model to ensure sustainable operations and identified a capital funding strategy of grants, loans and existing resources. With broad support across the community, local and regional organizations and governments, this project will support elders to age in place in the King Cove community. Client outcome: detailed business plan to support ICDBG grant and subsequent award. Update: The AHA is working to renovate the community center. Renovation funds were received; however, construction funds were not. AHA is planning to re-apply for construction funds this year. Once renovations are complete, EAT has committed to providing two meals per week in the Elder Care Facility.

Reference: Jennifer Harrison | Eastern Aleutian Tribes | jenniferh@EATribes.net | 907.277.1440 ext 510

Juneau Senior Housing and Services Market Demand Study

Juneau Economic Development Council | 2014 | The Juneau Economic Development Council (JEDC) is currently working with a community-based Assisted Living Task Force (ALTF) to begin addressing the need for senior housing and services in Juneau. The JEDC hired Agnew::Beck and Northern Economics to conduct a market demand study for senior housing and services, with a focus on assisted living. Agnew::Beck reviewed existing studies and conducted key informant interviews to identify gaps in the continuum and barriers that may prevent the market from filling these gaps. A public workshop was held in July 2014 to test these gaps using audience response polling to gauge preferences for senior housing models. Northern Economics was responsible for demographic and economic analysis to characterize current and future levels and trends related to retirement, income, and migration that affect the market for senior housing and services. The product of this work was a report that helps guide the JEDC as they work with providers and developers to bring additional housing and services to Juneau seniors. Update: The project has hit a roadblock due to financing, though the team continues to advocate for senior assisted living in Juneau. Maple Springs, a senior living company, is actively developing costs and development plans to build a new facility in Juneau and the team expects to hear back within the next month on whether Maple Springs plans to move forward.

Reference: Margaret O'Neal | Juneau Economic Development Council | moncal@jedc.org | 907-523-2326

Alzheimer's Disease or Related Dementia (ADRD) Alaska State Plan

Alaska Mental Health Trust Authority | 2013 to 2014 | Agnew::Beck worked closely with a core team including leaders from the Alaska Department of Health and Social Services, Alzheimer's Resource of Alaska, AARP and the Trust to draft a statewide roadmap to provide a comprehensive and coordinated approach to address the multiple and complex challenges that Alzheimer's disease and related dementia (ADRD) poses to individuals, families, caregivers and our State's budget. As part of this work, Agnew::Beck conducted a data review, background research, existing planning and needs assessments by the Alaska Commission on Aging. Agnew::Beck drafted the initial plan, prepared for and facilitated stakeholder work sessions to review the draft plan and determine action items. The final draft of plan was completed in December 2014; a prioritized implementation plan was adopted by the core team. Agnew::Beck has facilitated annual updates of the implementation plan since 2014.

Reference: Denise Daniello | Alaska Commission on Aging Executive Director |
denise.daniello@alaska.gov | 907.465.4879

Recommendations for an Alaska Long Term Care Strategic Plan

State of Alaska Department of Health and Social Services | 2012 to 2013 | The State of Alaska spent over \$476 million on home and community based services and skilled nursing care for 44,711 long term care recipients in Fiscal Year 2012. As the baby boom generation ages, a bubble of increased demand for long term care services will occur over the next three decades. This will increase costs, particularly as health care and related costs continue to rise. Looking to the future, there is a need to contain costs, ensure safe, quality care, while maintaining the right balance between home- and community-based services and skilled nursing facilities.

To address these issues, the State of Alaska Department of Health and Social Services (DHSS) hired Agnew::Beck to convene stakeholders and develop recommendations on ways to improve Alaska's long-term care system. Agnew::Beck provided technical assistance to the stakeholders by conducting best practice research, reviewing previous plans and evaluations of Alaska's long term care systems, facilitating advisory board meetings, and drafting a plan that includes recommendations for a statewide plan for long term services and supports. The draft recommendations help address rising costs, the lack of public accessibility to the system, and the need to effectively move people up and down the continuum of care based on their functional abilities. The results of this effort provide the basis for a future statewide strategic planning effort that will provide sustainable long-term care into the future.

Reference: Jared Kosin | Department of Health and Social Services | jared.kosin@alaska.gov | 907-334-2447

Oregon Veterans Long-Term Care Needs Assessment

Oregon Department of Veterans Affairs | 2013-2014 | Agnew::Beck and Rede Group, a Portland-based health planning firm, teamed up to help the Oregon Department of Veterans Affairs assess the supply and demand of long-term and nursing care facilities within the state. The project analyzed quantitative population health and patient data. We also reviewed projections for existing and planned nursing facility utilization and combined these data with qualitative input from veterans, family members and other key stakeholders. Patient data from the State of Oregon and Department of Veteran Affairs was analyzed to understand service utilization, delivery, and cost trends and compared to population need data to identify potential service gaps. The results of this needs assessment assisted the Oregon Department of Veterans Affairs in building a long-term plan for its facilities, internal structures and client services. The project team provided recommendations about nursing care demand and how the Oregon Department of Veterans Affairs can strategically respond to the demand.

Centennial Village Senior Housing: Vision For Community Wellness

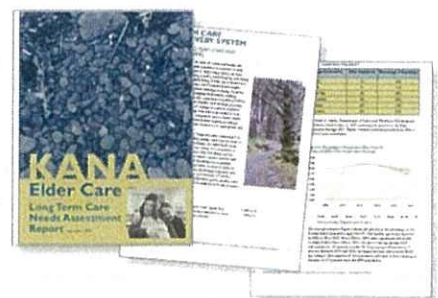
Cook Inlet Housing Authority | 2010 – 2011 | Agnew::Beck worked with Cook Inlet Housing Authority (CIHA) to develop a comprehensive wellness plan for residents living in Centennial Village, a senior housing community in East Anchorage. Agnew::Beck conducted stakeholder surveys and focus group meetings to inform a preliminary assessment of residents' physical and mental health status and interest in support services and activities as they age on campus. We visited senior living facilities throughout Anchorage and conducted extensive research into evidence-based practices for supporting seniors aging in place and best practices for housing providers in particular.



Based on these results Agnew::Beck created a campus master plan to guide physical improvements to the campus facilities; these were supplemented with recommendations for social and fitness programs to support healthy lifestyles. We learned that residents wanted to be able to get around campus more easily, indicating the need for changes in shuttle services and increased walkability among campus facilities. People also needed more reasons and natural places to socialize. While each residential building had community spaces, the campus as a whole had no community center where everyone felt welcome. Consequently, residents kept to their individual apartments and buildings. The master plan re-envisioned Centennial Village as a cohesive campus with increased connections among buildings, a mix of residential, community and retail uses, and a new campus center. The plan recommended renovating an existing building at the heart of the Centennial Village campus to create the "Centennial Center," where residents can run errands, enjoy events and activities, and socialize. Cook Inlet has since implemented the master plan, making improvements to walking paths, several buildings, and renovations to create the Centennial Center. Agnew::Beck also assisted CIHA with fundraising for the Centennial Center facility.

Elder Long-Term Care Needs Assessment And Long Term Care Guidebook

Kodiak Area Native Association | 2009 – 2010 | The goal of this two-year project was to understand and document the needs of Kodiak's Elders and their caregivers and to use this information to inform the development of future programs and services as part of a broader vision for Elder Long-Term Care. In year one, Agnew::Beck completed a regional needs assessment of existing services, facilities and Long-Term Care options available to Elders in the region and an implementation matrix. Year two resulted in a Long Term Care Guidebook that identified the processes and tools that KANA could use to implement the recommendations of the plan. This two-year project documented the needs of Kodiak's Elders and their caregivers and used this information as the basis for developing future programs and services to fit with the broader vision for Elder long-term care.



Agnew::Beck completed a regional needs assessment of existing services, facilities and long-term care options available to Elders in the region. Our firm also created an implementation matrix to guide the development of new services. The second year of the project focused on planning for implementation and building a coalition. The long-term planning process hinged on the meaningful involvement of Elders, their families and

caregivers. It also rested on care providers offering the direction needed to gain a better understanding of what assistance, approaches and strategies best meet the needs. Our team efficiently facilitated focus groups and conducted individual interviews with families and elders to ensure their voices were heard. Agnew::Beck also designed user-friendly outreach materials and original graphics illustrating new findings in a way that clearly communicated the need and the vision in an appealing way to Elders, families and caregivers.

Attachments

Resumes



MEGHAN HOLTAN, Senior Associate

Meghan Holtan is the creative and analytical force behind many of Agnew::Beck's planning projects. Her success is based in her ability to pick the right tool to analyze and communicate data. Meghan earned a master's degree in environmental science with a concentration in environmental and community planning. Her experience includes GIS analysis, cartography and web mapping. Since joining Agnew::Beck in 2010, she has projected senior population growth and conducted case study and best practices research for several long-term care projects in Alaska. Statewide policy projects include Recommendations for a Long Term Care Strategic Plan and Alaska's Roadmap to Address Alzheimer's Disease and Related Dementia. She has worked on business models to support elder services like assisted living, senior housing, skilled nursing and hospice for Maniilaq Association, Juneau Economic Development Council, South Peninsula Hospital, Catholic Community Service Hospice and Home Care of Juneau, Wasilla Area Seniors Inc., and Eastern Aleutian Tribes. She believes the principles that enable Alaskan seniors to age-in-place make vibrant communities for people of all ages.

EDUCATION

*Master of Science, Environmental Science:
Environmental and Community Planning
SUNY College of Environmental Science
and Forestry, Syracuse, NY. 2012*

*Environmental Decision Making
Certificate, SUNY College of
Environmental Science and Forestry +
Syracuse University, Syracuse, NY. 2012*

*Bachelor of Arts
University of Chicago,
Chicago, Illinois. 2004*

AFFILIATIONS

*Environmental Design and Research
Association, member*

*Planners Network, Organization of
Progressive Planners, member*

PUBLICATIONS + PRESENTATIONS

*"Social Life Under Cover: Tree Canopy and
Social Capital in Baltimore, MD".
Environmental and Behavior. 2014.*

*"Environmental Preference on the
Creekwalk: A GIS Analysis",
Environmental Design Research Association
43rd Annual Conference Proceedings. 2012*

*"Social Life Under Cover: Tree Canopy and
Neighborhood Social Connections". Master's
Thesis. 2012.*

*"Parsing Wildness: Parks in the Shrinking
City." Abstract for paper presentation
presented by Susan Dieterlen at Council of*

SELECTED PROJECT EXPERIENCE

Senior Needs Assessment

2019 | Characterized demographics of seniors in the Fairbanks North Star Borough, inventoried services to identify demand and estimated the future gap in services and housing based on anticipated increases in the senior population by geographic region. This project is ongoing. Client: North Star Council on Aging Role: Project Manager

Pioneer Home Staffing Plan and Cost Impact Analysis

2018 | Developed 500+ person staffing plan and modeled associated costs with increasing the acuity and residents served in the State of Alaska's six facility, 498-bed assisted living home system. Created alternative scenarios modeling the optimized use of nursing staff, alternative schedules, and part-time and full-time employees. Client: Alaska Mental Health Trust Authority. Role: Project manager

Elder Facility Feasibility Study + Business Plan

2017 – 2018 | Analyzed market data, estimated utilization and future demand for assisted living and senior housing. Developed proforma of three scenarios for the reuse of TCC's existing patient hostel as a dedicated Elder Facility. The business plan will summarize the selected model. Tanana Chiefs Conference. Role: Project manager.

Unalaska Elder Services Feasibility Study

2017 | Researched and modeled demographic changes in the elder population in Unalaska and the greater Aleutian region to support the financial feasibility of assisted living, adult day and care coordination. Analyzed the financial feasibility of care coordination. Client: Aleutian Pribilof Islands Association. Role: Analyst.

Elder Coordinator Grant Research

2017 | Researched grant and fee for service options to fund an elder coordinator to connect elders to services in the Aleutian region. Client: Eastern Aleutian Tribes. Role: Researcher.



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health crisis who seek services at an emergency department. Researched national best practices, gathered data to frame the issue and developed a presentation to inform stakeholders.

Division of Alaska Pioneer Homes Staffing Plan + Cost Impact Analysis

2018 | The Alaska Mental Health Trust Authority contracted with Agnew::Beck to develop a staffing plan and cost impact analysis that will help the Pioneer Homes continue to meet its mission and short-term goals. As an analyst for this project, compiled internal and market data to inform an understanding of current and future utilization and demand. Developed a PowerPoint presentation to clearly communicate information learned to the client.

Alaska Mental Health Trust Authority On-Demand Technical Assistance

2018 to present | Researched funding opportunities using online databases and subscriptions in Trust focus areas of mental illness, developmental disabilities, chronic alcohol or drug addiction, Alzheimer's disease and related dementia and traumatic brain injuries. Provided proposal development and technical assistance to beneficiary-related projects.

Tundra Women's Coalition Community Needs Assessment

2018 | Collected and analyzed quantitative data and facilitated stakeholder and community discussions to inform a Community Needs Assessment for the Bethel-based domestic violence and sexual assault service provider, Tundra Women's Coalition. Developed a PowerPoint presentation to communicate quantitative and qualitative results to stakeholders.

Municipality of Anchorage Human Services Transportation Coordination Plan

2018 | Subcontracted with Portland based company, GridWorks to implement public involvement and stakeholder engagement activities necessary to update Anchorage's Coordinate Human Services Transportation Plan. Staffed open houses and assisted with focus groups.

ANTHC Traditional Foods Activity Book Evaluation Project

2018 | Served as the project associate for the Traditional Foods Activity Book Evaluation Project. The project aim was to determine how successful the activity book has been at reaching its goals and to develop recommendations based on evaluation findings. Reviewed data collection tools, facilitated data collection activities, analyzed and summarized results, developed client recommendations and drafted final report.

Senior/Elder Falls Prevention Environmental Scan Project

2018 | Provided project support for the Senior/Elder Falls Prevention Environmental Scan Project. The goal of the project was to better understand what existing resources and services are being offered in the state of Alaska aimed at preventing seniors/elders from experiencing harmful falls. Researched senior/elder falls prevention services to inform the development of an Alaska Senior/Elder Falls Prevention Resource + Services Guide.



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SHANNA ZUSPAN, AICP

Shanna is a Principal and Co-Owner of Agnew::Beck Consulting with a background in financial and economic analysis, as well as community planning. Born and raised in McCarthy and Anchorage, Shanna is passionate about helping communities find solutions to the critical issues facing Alaska's future. Whether working with local governments, tribal entities, state agencies, or the private sector, Shanna provides objective facts and analytical tools to help organizations find common solutions to critical issues. She is skilled at translating complex technical data so that it is understandable and transparent.

SELECTED PROJECT EXPERIENCE

Pay for Success Feasibility Study

2018 | On behalf of the United Way of Anchorage, prepared a financial feasibility analysis of the potential cost avoidance associated with utilizing a pay for success model to sustainably fund permanent supportive housing in Anchorage and Mat-Su. Role: Project Manager and Lead Analyst.

Elder Care Facility Business Plan

2018 | Led the process to prepare a business plan to transform the Bertha and Johnson Moses patient hostel into an elder care facility. Presented options to the TCC Executive Board and other stakeholder and partner groups Role: Principal-in-Charge.

Market & Feasibility Analysis

2017 | Prepared a market and financial feasibility analysis for a private property owner in downtown Anchorage. The proposed project included mixed-use residential and office and identified the rate of return for various development scenarios. Role: Financial Analyst and project manager.

Eielson Air Force Base Regional Growth Plan Housing Component

2017 | Estimating housing demand from the planned bed-down of the F-35s and comparing demand to available supply. Identifying obstacles to new housing solutions with a menu of options to improve housing opportunities. Client: Fairbanks North Star Borough Role: Housing lead

Redevelopment Technical Assistance

2016/17 | Providing technical assistance to Anchorage Community Development Authority as they evaluate a range of mixed use redevelopment projects in the downtown area. Prepares pro forma financial analysis to evaluate project feasibility. Client: Anchorage Community Development Authority. Role: Financial Analyst and technical assistance provider

Live Work Play Housing Feasibility Primer

2016/17 | Developed a simplified real estate pro forma for multi-family housing to assist policy makers in better understanding what it takes to make a housing project "pencil." Pro forma can be modified in real time at a public meeting to see how public incentives improve housing feasibility. Client: Cook Inlet Housing Authority. Role: Analyst and presenter

City of Soldotna Analysis of the Fiscal Effects of Annexation

2015/16 | Worked with Northern Economics to develop a fiscal analysis of annexing land to the City of Soldotna. Assisted the City

EDUCATION

*Master of City Planning, Housing Community + Economic Development
Massachusetts Institute of Technology,
Cambridge, MA. 2001*

*Bachelor of Arts in Political Science +
Economics. University of Northern
Colorado, Greeley, CO. 1997*

PROFESSIONAL EXPERIENCE

Principal, Agnew::Beck, 2010 to present

*Public Finance Manager + Redevelopment
Planner, City of West Sacramento, 2004 to
2010*

*Senior Associate, Economic & Planning
Systems, Inc., 2001 to 2004*

CERTIFICATIONS +AFFILIATIONS

*American Institute of Certified Planners
(AICP)*



with public outreach and provided technical assistance related to state annexation regulations. Client: City of Soldotna. Role: Planner

Maniilaq Elder Services Business Plan

2016 | Developed a financial pro forma and business plan for expanded elder services in the Kotzebue region. Facilitated an 80-person community workshop with audience response technology to develop a plan to better serve elders. Client: Maniilaq Association. Role: Project Manager + Facilitator

King Cove Senior Housing Center Business Plan

2015 | Developed a project program and pro-forma to determine viability of renovating the existing community center to a four-unit senior housing addition with a caregiver unit and shared community facilities. Client: Eastern Aleutian Tribes. Role: Project Manager

Peach Investments Development + Planning Assistance

2014/15 | Prepared real estate feasibility analysis and developed framework public/private partnership to incentivize an Anchorage downtown redevelopment project. Client: Peach Investments Role: Finance Analyst

Wasilla Area Seniors Incorporated Continuing Care Feasibility Study

2014/15 | Preparing a financial feasibility assessment for WASI to help them assess whether to add additional senior services to their campus in Wasilla. Client: Wasilla Area Seniors Incorporated Role: Project Manager

Juneau Senior Housing + Services Demand Study

2014 | In collaboration with Northern Economics, preparing a market demand assessment for senior housing and services with a focus on assisted living. Client: Juneau Economic Development Council. Role: Project Manager

Tlingit Haida Regional Housing Authority Housing Needs Assessment

2014 to current | Prepared a housing needs assessment to help the THRHA determine where and how to invest in new housing in Southeast Alaska. Continued work on housing implementation with the Organized Village of Kake. Client: THRHA. Role: Project Manager

Knik Arm Crossing Socioeconomic Study

2013 | In collaboration with Cardno, prepared an independent socioeconomic analysis of the Anchorage and Mat-su as part of the Knik Arm Crossing. Client: Knik Arm Bridge and Toll Authority. Role: Local Project Manager

Hatcher Pass Government Peak Market Analysis

2013 | Assessed the market demand and supply for residential and commercial development in the Government Peak Sub-Unit of the Hatcher Pass area. Client: Matanuska Susitna Borough. Role: Project Economist

Opportunities + Constraints Analysis for West Sacramento Land

2013 | Prepared a physical and market opportunities and constraints analysis for property in the CIRI portfolio. Client: Cook Inlet Land Development Corporation. Role: Project Manager

Municipality of Anchorage Commercial Lands Assessment

2010 | Developed a build out model to estimate the carrying capacity of vacant land zoned for commercial development in the Municipality of Anchorage. Client: Municipality of Anchorage. Role: Analyst



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THEA AGNEW BEMBEM, Managing Principal

Thea Agnew Bembem is the managing principal and co-founder of Agnew::Beck Consulting, a planning, policy and community development firm based in Anchorage, Alaska. Thea has 23 years' experience working with statewide and community organizations to bring about real improvements in the health and social conditions of the people they serve. Thea couples her expertise in health and human services planning with strong experience working with Alaska Native communities and tribal organizations. Thea is an experienced facilitator of decision-making dialogue on a wide range of public policy issues.

In recent years, Thea led the effort to develop recommendations to redesign Alaska's Medicaid program; she has worked with many tribal health corporations and statewide and community organizations to expand services for Elders, people with behavioral health issues and disabilities, and to strengthen vulnerable families; she is currently helping a coalition of organizations in Anchorage to achieve functional zero homelessness.

EDUCATION

Master of Arts in History. Graduate Theological Union, Berkeley, CA. 2000. Defended thesis with honors.

Bachelor of Liberal Arts, emphasis in Philosophy and Math. St. John's College, Santa Fe, NM. 1995. Senior Oral exam earned honors.

AFFILIATIONS

Board Member, Alaska Humanities Forum, 2017-present.

Board Member, Commonwealth North (2014-2018) Program Committee, Chair (2016-2018).

Rogers Park Elementary PTA, President (2016-18)

Board Member, Thomas Center for Senior Leadership, (2013-present).

Board Member, Anchorage Urban League (2005-2010).

Board Member, Wrangell Mountains Center (2004-2012).

President (two terms) + Treasurer (one term) + board member, McCarthy Area Council (1999-2002; 2016-present).

SELECTED PROJECT EXPERIENCE

Providence Mental Health Strategic Planning + Behavioral Health Improvement
2018 to present | Lead staff for strategic planning facilitation and community engagement process with internal and external stakeholders. Client: Renee Rafferty, 907-212-6900.

Volunteers of America, Alaska Business Analysis + Opportunity Assessment
2018 to present | Provides oversight to the project, facilitated community engagement assisted with business analysis and is the main point of contact for the client. Client: Sherrie Hinshaw, 907-279-9634.

Division of Alaska Pioneer Homes Staffing Plan + Cost Impact Analysis
2018 to present | Principal in Charge of project to prepare a staffing plan and cost impact analysis for Alaska's Pioneer Homes to ensure appropriate staffing ratios and understand how the Homes service package can be best matched with appropriate resources. Conducted site visits to understand how current staffing is or is not meeting the care needs of residents. Client: Valette Keller, 907-269-7960.

Pay for Success Demonstration, Feasibility Assessment for Permanent Supportive Housing
2017 to present | Performed data match to identify target population and cost model to quantify cost avoidance from providing Permanent Supportive Housing to high needs individuals who are homeless and have been criminally involved. Client: United Way of Anchorage, Monica Gross, 907-263-3873.

Anchorage Plan to End Youth and Young Adult Homelessness
2017 to 2018 | Convened stakeholders to draft HUD-approved plan to implement the Youth Homeless Demonstration Program; support leadership and Youth Task Force for implementation. Client: Alison Kear, 907-339-4203.

Alaska 2-1-1 Market Research + Business Planning
2017 to present | Completed research and developed plan for Alaska 2-1-1 to increase the breadth, usability and value from the system to connect Alaskans in need with community resources. Developed recommendations and financial pro forma. Client: United Way of Anchorage, Sue Brogan, 907-263-3821.



Alaska Native Tribal Health Consortium Statewide Behavioral Health Treatment Services
2017-2018 | Assessed the feasibility of and developed a financial pro forma for providing statewide behavioral health treatment services. Client: Tina Woods, 907-563-2662.

Medicaid Redesign and Expansion Technical Assistance Project; Implementation Support
2015-2017 | Led policy research and actuarial analysis, facilitated stakeholder engagement to recommend options for Medicaid redesign. Supported teams developing Section 1115 waiver application for behavioral health system reform. Client: DHSS, Monique Martin, 907-269-7848.

Norton Sound Health Corporation Behavioral Health Services + Facility Expansion
2017 | Reviewing business plan and developing a funding plan for a new behavioral health facility in Nome, Alaska. Client: Lance Johnson, 907-443-3339.

Alaska Community Reentry Program, Coalition Training + Technical Assistance
2016 to present | Developed program manual and trainings; facilitate in-person training and planning with seven community coalitions to improve success of those reentering communities from prison. Client: Alysa Wooden, 907-264-0641.

Alaska Mental Health Trust Authority Technical Assistance
2002 to present | Provide technical assistance to projects for integration of behavioral health and primary care, long-term services and supports, affordable and accessible housing and rural issues. Client: Katie Baldwin-Johnson, 907-269-7960.

Pioneer Homes Leadership Strategic Plan, 2017-2020
2017 | Facilitated Leadership Team to develop plan to optimize quality of care and sustainability of the Pioneer Homes. Client: Amanda Lofgren, 907-343-7206.

Fetal Alcohol Spectrum Disorders Statewide Strategic Plan, 2017-2020
2017 | Facilitated statewide stakeholder group to develop strategic plan to prevent FASD and to address the needs of Alaskans affected by it. Client: Christie Reinhardt, 907-269-8992.

North Slope Borough Substance Use Disorder Treatment Facility Feasibility Study
2016 | Analyze behavioral health prevalence and utilization rates to determine feasibility for a treatment center in Utqiagvik. Client: Justina Wilhelm, 907.852.0280.

Mat-Su Coordinated Care Pilot Project
2016 | Drafted concept paper to form Coordinated Care Organization to provide integrated health and social supports for Medicaid and Medicare eligible adults in the Mat-Su Borough. Client: Donn Bennice, 907.746.6231

General Relief Resident Assessment
2016 | Conducted 350 in-person assessments of clients participating in the General Relief program in the Anchorage area. Client: DHSS, Kelda Barstad, 907.269.3677

Maniilaq Association Long-term Services + Supports Business Plan
2016 | Developed a business plan for expanded elder services in the Maniilaq region. Client: Bree Swanson, 907.442.7031

Alaska Cancer Plan Update, Alaska Comprehensive Cancer Control Program
2016 | Updated five-year statewide plan to decrease the burden of cancer on Alaskans. Client: DHSS, Julia Thorsness, 907.269.8092

Mat-Su Health Foundation, R.O.C.K. Mat-Su Collective Impact
2015 to present | Facilitate design team meetings to develop program design for a community-wide initiative to reduce child maltreatment



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SELECTED RESEARCH + PUBLICATIONS

Community Comprehensive Planning Guidebook

Wrote and revised workbook to assist rural communities with comprehensive plan development (2005)

Community Facility Planning Workbook

Wrote and revised workbook to assist rural communities with planning for facility development (2003)

"I became aware in the middle of people who were dancing" A Post-colonial Historiography of the Russian Orthodox and American Protestant Missions to the Yup'ik-speaking Peoples of Western Alaska, from 1845

Master's thesis based on extensive research into Yup'ik oral history, and anthropological and historical writings (2000)

and increase family resilience in Mat-Su Borough communities. Client: Desiré Shepler, 907.352.2845.

Conflict-free Case Management System Design

2014-2015 | Facilitated multi-stakeholder process to identify system components, system design and implementation plan to transition to conflict-free case management for Medicaid waiver participants, as required by the Affordable Care Act. Client: Lizette Stiehr, 907.854.0322

Maniilaq Behavioral Health Program Assessment + Business Plan for Expansion

2014-2015 | Provide policy and financial analysis, facilitation of stakeholder engagement and report production to assess behavioral health continuum of care and develop a feasibility assessment for new and re-tooled facilities and services. Client: Bree Swanson, 907.442.7031

Alaska Behavioral Health Systems Assessment

2014-2016 | Principal-in-charge of a comprehensive assessment of Alaska's State-funded behavioral health system. Client: Alaska Mental Health Trust Authority, Michael Baldwin, 907.269.7969

Alaska Alcohol Beverage Control (Title 4) Review

2012-2016 | Support steering committee and subcommittees of statewide stakeholder group to review current alcohol control law (Title 4) and recommend revisions to statute to regulate availability and sale of alcohol and the larger goal to address alcohol-related issues in Alaska. Client: Rasmuson Foundation, Aleesha Towns-Bain, 907.297.2700.

Division of Behavioral Health, Community Prevention Support Team

September 2011 to June 2015 | Led Community Prevention Support Team that provided training and technical assistance to six community grantees of the Strategic Prevention Framework, State Incentive Grant. Client: Prevention + Early Intervention, Behavioral Health. Diane Casto, 907.465.1188.

Mat-Su Community Health Assessment: Community Engagement Initiative

December 2012 to June 2013 | Oversee contract and public engagement to complete the Community Health Assessment for the Mat-Su Borough. Client: Melissa Kemberling, PhD, MPH, Mat-Su Health Foundation, 907.352.2894

Office of Children's Services, Leadership Team Support

December 2012 to July 2013 | Work closely with OCS Director and Leadership Team to define organizational priorities and facilitate strategic planning. Client: Christy Lawton, OCS, 907.451.2096

Implementation of Comprehensive Family-Centered Treatment and Supportive Housing

March 2012 to June 2013 | Facilitated multi-agency stakeholder group to develop the program design and financial plan for integrated housing and treatment model. Client: Stacy Toner, Alaska Division of Behavioral Health, 907.465.2817

'Ready to Work' Regional Workforce Development Study for the Calista Region

July to October 2012 | Developed a comprehensive study of best practices in workforce development and indigenous hire in the mining industry worldwide to increase local employment in the Calista region. Client: April Brehm, Donlin Gold, 907.569.0344.

Iliniuk Family Health Services, Unalaska, Alaska

September 2009 to June 2010 | Oversaw the assessment of community needs and existing health services, determined financial feasibility of expanding existing clinic, and recommended strategies

for aligning services to best meet current and future patient needs. Client: Sonia Handforth-Kome, 907.581.1202 x4112

State of Alaska, Tobacco Control and Prevention Program

September 2010 to present | Oversee three contracts that provide program assessment, strategic planning and implementation and strategic guidance for Mission 100 outreach and technical assistance project. Client: Tobacco Control and Prevention Program. Cheri Hample, Program Manager 907.269.4635.

Early Learning Opportunities Village Planning

2003 to 2004 | Designed process, performed needs assessment and facilitated Early Learning Opportunities village planning project in eight villages, developed guidebook for future village planning. Client: Bristol Bay Native Association, Brenda Akelkok, 907.842.5257.

Family Resource Center + Health Clinic Planning + Development

2002 to 2004 | Facility business planning and fundraising in seven villages to develop family resource center and health clinic facilities; secured \$6.1 million for capital development. Client: Bristol Bay Native Association, Brenda Akelkok, 907.842.5257.



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BECKY BITZER, MSW

Becky is an Associate with Agnew::Beck, joining the team in 2017. She holds a Master of Social Work from Washington University in St. Louis and a Bachelor of Social Work from the University of Missouri – Columbia. Becky strives to bring the social work values of service, social justice, dignity and worth of the individual, the importance of human relationships, integrity, and competence to both her personal and professional life. These values guide and bring success to her work connecting with stakeholders statewide. Becky is an avid traveler and started her career in Alaska by bringing behavioral health trainings and resources to providers across the state. This travel experience helps inform her understanding of the unique opportunities and challenges facing individuals and communities in the 49th state.

EDUCATION

Master of Social Work, Washington University in St. Louis, 2012.

Bachelor of Social Work, University of Missouri – Columbia, 2010.

OTHER PROFESSIONAL EXPERIENCE

*North Star Behavioral Health
2016-2017 | Intake Clinician*

*United Way of Anchorage
2015-2016 | Community Plus
Schools Manager*

*North Star Behavioral Health
2013-2015 | Clinical Community
Liaison*

*Rur:AL CAP, Homeward Bound
2012 | Case Management Intern*

*Old North St. Louis Restoration Group
2012 | Farmers Market
Coordination Intern*

PROJECT EXPERIENCE

Matrix Model Learning Collaborative Support

2019 to present | Through a contract with the Division of Behavioral Health managed a listserv of over 100 attendees, developed electronic updates using Mail Chimp and coordinated bi-monthly support calls, including email invitations, reminders and attendance tracking.

Forensic Psychiatric Hospital Feasibility Study

2018 to present | Collected and analyzed available quantitative data related to the forensic psychiatric population to determine the feasibility of a stand-alone psychiatric facility for forensic patients. Participated in key partner and stakeholder interviews. Produced written report for the Division of Behavioral Health highlighting key data findings, areas of concern in the system and recommendations.

R.O.C.K. Mat-Su Community Engagement for Proposed Children's Museum

2018 to present | Through a contract with the Mat-Su Health Foundation, developed focus group presentations to educate community members about a proposed children's museum in the region and gather community input about the proposal. Created an online survey to gather wider community input and produced a brief report highlighting focus group and survey respondents' thoughts and ideas about the proposed museum.

Youth 360 Strategic Planning + Initiative Development Support

2018 to present | Connecting youth to safe spaces and developmentally appropriate afterschool activities is one component of the Youth 360 initiative. Through a contract with the Mat-Su Health Foundation, supported the work of Youth 360 by developing meeting agendas for the leadership team and workgroups and drafting a strategic plan and operational guidelines with input from the initiative team.

Acute Behavioral Health Improvement Project

2018 to present | Through a contract with the Alaska State Hospital and Nursing Home Association, assisted with a stakeholder engagement process to develop solutions to improve care for individuals experiencing an acute mental

OTHER PROFESSIONAL EXPERIENCE

Research Assistant, SUNY College of Environmental Science and Forestry, 2011-2012

Quality Control Enumerator, U.S. Census Bureau, 2010 Decennial Census

Juneau Hospice Business Plan

2016 | Analyze current Medicare hospice program and two to three alternative models to develop a sustainable business plan to provide hospice services to the Juneau community. Client: Catholic Community Service. Role: Project Manager

Maniilaq Elder Services and Supports Strategic Planning

2016 | Developed business models and plan to support expanded elder services and/or facilities in the Maniilaq region. Client: Maniilaq Association. Role: Analyst.

Long-term Care Strategic Planning

2015 | Provider survey, demographic analysis of population projections and income for Kenai Peninsula Borough seniors. Feasibility analysis for medical home hospice. Client: South Peninsula Hospital. Role: Analyst.

King Cove Senior Housing Center Business Plan

2015 | Developed a project program and pro-forma to determine viability of the renovation of the existing community center to four-unit senior housing addition with a caregiver unit and shared community facilities. Client: Eastern Aleutian Tribes. Role: Associate.

Continuing Care Community Feasibility Study

2014 | Inventoried existing assisted living, personal care, hospice and other senior services in the Mat-Su Valley and projected future needs to inform a needs assessment and pro-forma. Client: Wasilla Area Senior Inc. Role: Associate

Alaska's Roadmap to Address Alzheimer's Disease and Related Dementia

2014 | Analyzed data sets for trends in dementia and relevant cost and utilization of senior services. Prioritized strategies and wrote Plan. Client: The Trust. Role: Associate

Juneau Senior Housing + Services Market Demand Stud

2014 | Interview key informants and analyze trends to determine best mix of senior housing and services to meet the growing demand in Juneau. Client: Juneau Economic Development Council. Role: Associate.

Oregon Department of Veterans Affairs Mapping

2014 | Mapped veteran population and existing veteran's homes to determine catchment areas for a potential new VA home. Client: Oregon Department of Veterans Affairs. Role: Associate

Recommendations for the Alaska Long Term Care Strategic Plan

2013 | Researched best practices and engaged stakeholders to develop recommendations for the long-term services and supports system in Alaska. Role: Associate.



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